

Core Managers: Managing Service Request Workflow & Billing

Questions? Contact VUMCcores@vumc.org

Service Requests

Cores utilizing the iLab Project Workflow functionality should reference this guide on full system behavior and procedures.

Requesting Services

Customers should submit a request for service by open the core's iLab site and navigating to the Request Services Tab.

1. On the Request Services page, there will be a list of available services.
 - a. Click on the **Request** button to the right of the service you would like to request.
2. Select the user by entering the name of the person for which you wish to make the request and click the **Proceed** button.
 - a. Note: Make sure you are searching within "this institution" or "all" if you are looking for a user that has not yet used the core.
3. Complete the submission **form**. All required fields marked by a red star.
4. In the **payment information** section, select the billing number from the **drop-down menu**.
 - a. If you do not know the payment number, do not select a billing number from the drop-down menu. The core user will be able to update the request with the correct billing information.
 - b. Split Charge: The cost-of-service requests can be allocated across billing numbers.
 - i. To allocate across multiple billing number, click **split charge**.
 - ii. Select the additional billing number from the drop-down menu.
 - iii. Enter the % allocations to split the cost across the billing numbers.
 - c. Billing number Notes: Lab members will need to be granted access to billing numbers by the PI and/or the Lab Manager.
5. **Submit the request.** Once the request is submitted, the **View All Requests** tab will open to display the new request.

Cores may wish to submit a request on behalf of the customer:

1. When initiating the request, select the user by entering the customer's name and click the **Proceed** button.
 - a. Note: Make sure you are searching within "this institution" or "all" if you are looking for a user that has not yet used the core.
2. Complete form and select the payment information.
3. You may wish to route the request to the researcher for approval.
 - a. If so, click the **submit request to researcher** button at the bottom of the page to submit the request.
 - i. Once the request is submitted, the **View All Requests** tab will open to display the new request.
 - ii. The status of the request will typically be **Waiting for Researcher Approval** indicating that the request owner needs to review the request to approve the proposed work and projected cost.
 - b. If you wish to skip the approval process, check the **Skip approval?** option. Then click, **submit request to researcher** button to submit.
 - i. Once the request is submitted, the **View All Requests** tab will open to display the new request.
 - ii. The status of the request will typically be **Waiting for Core to Begin**.

3) Payment Information

You may supply the Billing Number (optional)
Please enter the Billing Number

% @ Billing Number
1/100.0 % Select Billing Number

100.0% total allocated @

split charge

enter additional payment information

Skip approval?

Check box to skip customer approval process.

Click here to submit the request.

submit request to researcher save draft request Cancel

Processing Service Requests

The core can view all new and active services requests on the **View all Requests** tab. The core should check this section iLab to approve and process any new service requests.

To review new requests:

1. All new service requests will be in the **Waiting for Core to Agree** status.
2. Click the **blue arrow** to expand the service request.
3. The details of the request are displayed. The following areas may be updated.

The screenshot displays the 'Nutrition and Food Science' iLab interface. The main content area shows a table of active requests. One request is expanded, showing details for a request dated Jan 07, 2018, for Maxine Appel, with service ID NFS-MA-1590. The status is 'Waiting for Core to Agree'. The cost is \$0.00. The interface includes various action links and buttons, such as 'Agree', 'Disagree', 'edit', 'update payment information', 'add service', 'add charge', 'add form', 'add milestone', 'change order', 'add event', 'add comment', 'Attachments & URLs', 'add attachment', 'add url', 'add to history', 'Shipping Information', 'Billing Information', and 'View Form: Nutrition Request Form'. Numbered callouts (1-9) highlight specific interactive elements.

- a. **Item 1: Action icons.** These buttons allow you to update payment information (dollar sign icon), add a comment (text box icon), or print or cancel the request (pencil icon).



- b. **Item 2: Edit Overview** information, such as Project Description, Status, and Projected Cost.
- c. **Item 3: Update payment information** (functions same as the dollar sign icon).
- d. **Item 4: Add an attachment** or url.
- e. **Item 5: Add a note** to the history section.
- f. **Item 6: Edit Shipping Information.**
- g. **Item 7: Edit Billing Information.**
- h. **Item 8: Add a comment.** An email will be sent to notify designees copying the comment.
- i. **Item 9: Add/delete a form and view request details.**

To agree to request and provide a customer quote:

1. Review the form responses and **Lock & Save Form**.
 - a. This is highly recommended – If the core does not lock the form, the customer may make changes and the core will not be notified.
2. Click **add service** to add services from the core's service list to build the quote and calculate the project's projected cost.

The screenshot shows a web application interface for managing requests. At the top, there are navigation tabs: ABOUT OUR CORE, SCHEDULE EQUIPMENT, REQUEST SERVICES, VIEW ALL REQUESTS, and RESERVATIONS. Below these are buttons for Message Customers and Reload Active Requests. The main content area is titled 'active requests' and displays a table of requests. The first request is for 'Desmond Fritch' on 'Dec 09 2015' with service ID 'PC-DF-354'. The status is 'Waiting for Core to Agree' and the cost is '\$0.00 (\$100.00)'. A callout box points to the 'date' column with the text 'Click to expand.' Below the table, there are sections for 'View Form: Sample Submission Form' and a list of services. The 'Gels' service is highlighted, showing a quantity of 1.0, unit price of \$100.00, and total of \$100.00. A callout box points to the 'add service' link with the text 'add service add charge add form add milestone change order'. At the bottom, there are sections for 'Comments', 'Attachments & URLs', 'Service Request History', and 'Billing Information'.

3. If there are multiple services available, you may choose to scroll down the list to locate the service of interest. Alternatively, you may start typing the service name in the search field to view a restrict set of services.

The screenshot shows a search interface for services. At the top, there is a search field with the text 'Search:'. Below the search field, there is a list of services with columns for 'Name', 'Quantity', and 'Show alphabetically'. The services listed are: Affinity Selection (3), Band Excision (1), Chromatography Fractionation (1), Data Analysis (1), Detergent Removal (1), Digestion (3), Gels (2), LC/MS/MS (4), Labor Charges (1), Targeted Assay Development (1), Visiting Scientist (1), Zip Tip (1), and ITRAQ/TMT (1). The 'Gels (2)' service is expanded, showing two items: 'Gel Stain - Price/Gel. Please indicate number of gels.' with a quantity of 0 and a price of \$60.00, and 'SDS-PAGE - Price/Gel. Please indicate number of gels.' with a quantity of 0 and a price of \$200.00.

4. Enter the unit quantity and then click the **green plus button** to add the service.
 - a. The service line item is added.

The screenshot shows a web application interface for managing service requests. At the top, there are navigation tabs: ABOUT OUR CORE, SCHEDULE EQUIPMENT, REQUEST SERVICES, VIEW ALL REQUESTS, and RESERVATIONS. Below the tabs, there is a header section with fields for date, for, service id, status, and cost. The status is "Waiting for Core to Agree" and the cost is "\$0.00 (\$160.00)". There are "Agree" and "Disagree" buttons. Below the header, there are sections for Overview, Payment Information, and Forms and Request Details. The Forms and Request Details section includes a "View Form" button and a list of service items. A callout bubble points to a newly added service line item with the text "Your new service." The service line items table is as follows:

Date	Description	Quantity	Unit price	Total	Billing Status	Work Status
Dec 09 02:46 PM	Gel Stain - Price/Gel. Please indicate number of gels.	0.0	\$60.00	\$0.00	Not Ready	Proposed
Dec 09 02:47 PM	(charge) stain Microscopy	1.0	\$100.00	\$100.00	Not Ready	Proposed
Jan 12 10:17 PM	Gel Stain - Price/Gel. Please indicate number of gels.	1.0	\$60.00	\$60.00	Not Ready	Proposed

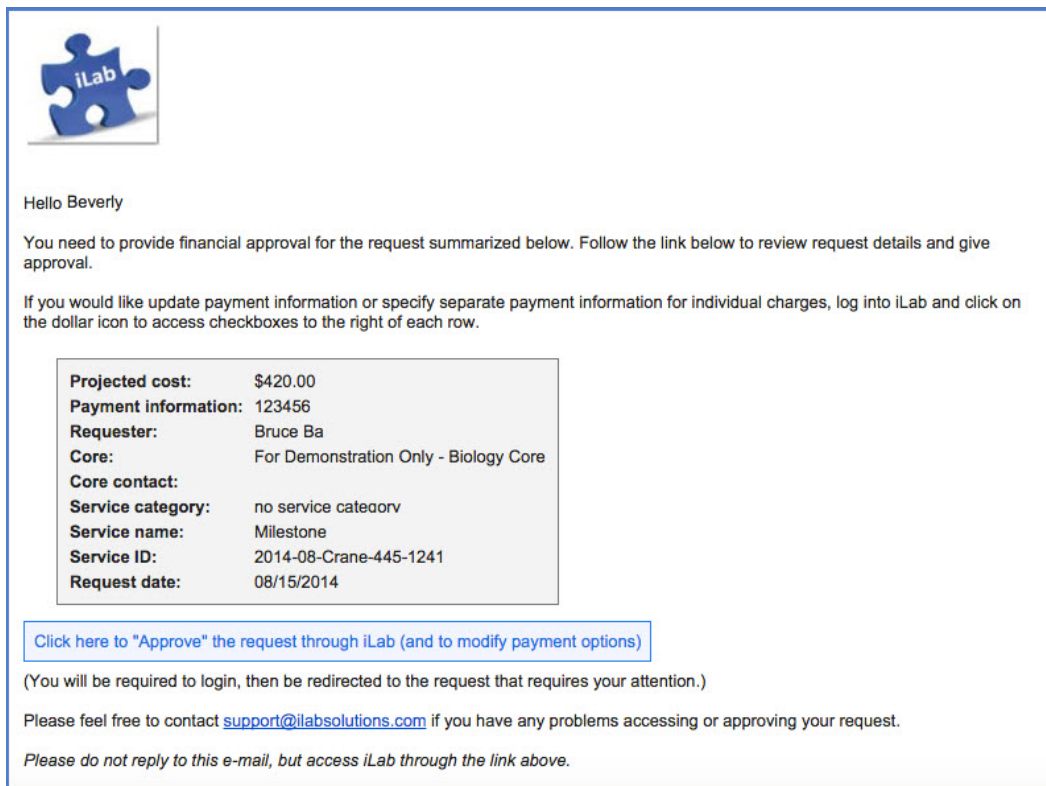
5. Agree to the service request by clicking the **agree** button.

The screenshot shows the same web application interface as above, but with the "Agree" button circled in red. The status of the request has changed to "Waiting for Core to Agree" and the cost is now "\$0.00 (\$260.00)". The service line items table is as follows:

Date	Description	Quantity	Unit price	Total	Billing Status	Work Status
Dec 09 02:46 PM	Gel Stain - Price/Gel. Please indicate number of gels.	0.0	\$60.00	\$0.00	Not Ready	Proposed
Dec 09 02:47 PM	(charge) stain Microscopy	1.0	\$100.00	\$100.00	Not Ready	Proposed
Jan 12 10:17 PM	Gel Stain - Price/Gel. Please indicate number of gels.	1.0	\$60.00	\$60.00	Not Ready	Proposed
Jan 12 10:23 PM	(charge) Stain Microscopy	1.0	\$100.00	\$100.00	Not Ready	Proposed

6. **Create the quote.** Review the project cost, enter in the quote expiration date if applicable and indicate which items on the request you want included on the PDF quote.
 - a. Check the box next to **include pdf quote**.
 - b. Click on **submit** to send the PDF quote and link to the request in iLab in an email to the request owner.

7. When you click **submit** on the quote, an email will be generated and sent to the email addresses designated with a summary of the project and a quote included.



8. The new information displays in the request and the request status is now **Waiting for Researcher to Agree**.
 - a. **IMPORTANT:** The request will need to be approved by the customer before the core begins work.

PC-DF-354
The researcher must agree to the new projected cost.

date	for	service id	status	cost
Dec 09 2015 (Dec 09 2015)	Desmond Fritch Fritch, Desmond (UONB) Lab	PC-DF-354 Click here to request services	Waiting for Researcher to Agree <input type="button" value="Agree"/> <input type="button" value="Disagree"/>	\$260.00 (\$260.00)

- Overview edit
- Payment Information update payment information
- Forms and Request Details (see bottom of list to add items to this request) ⋮

[View Form](#): Sample Submission Form Visible

- Consultation *description: click to edit* *note: click to edit* Not Started
- Sample Received *description: click to edit* *note: click to edit* Not Started
- Digestion *description: click to edit* *note: click to edit* Not Started
- Data Analysis *description: click to edit* *note: click to edit* Not Started

	Quantity:	Unit price:	Total:	Billing Status:	Work Status:	
▶ Dec 09 02:46 PM Gels Gel Stain - Price/Gel. Please indicate number of gels.	<input type="text" value="0.0"/>	\$60.00	\$0.00	Not Ready	Proposed	<input type="button" value="X"/>
▶ Dec 09 02:47 PM (charge) stain Microscopy	<input type="text" value="1.0"/>	\$100.00	\$100.00	Not Ready	Proposed	<input type="button" value="X"/>
▶ Jan 12 10:17 PM Gels Gel Stain - Price/Gel. Please indicate number of gels.	<input type="text" value="1.0"/>	\$60.00	\$60.00	Not Ready	Proposed	<input type="button" value="X"/>
▶ Jan 12 10:23 PM (charge) Stain Microscopy	<input type="text" value="1.0"/>	\$100.00	\$100.00	Not Ready	Proposed	<input type="button" value="X"/>

[add service](#) [add charge](#) [add form](#) [add milestone](#) [change order](#)

Build a quote, or add components to a new or running request using the 'add' links above.

Generate PDF quote

Comments [add comment](#) [Attachments & URLs](#) [add attachment](#) [add url](#)

To indicate that work has started on a request:

1. If the user and core have agreed to the work, and the Financial Approver has approved the projected cost and payment, work may begin on the request. The status of the request will be **Waiting for Core to Begin**.

date	for	service id	status	cost
Jan 05 (Jan 05 2015)	Desmond Fritch Fritch_Desmond (UONB) Lab	PC-DF-358 Affinity Selection	Waiting for Core to Begin <input type="button" value="Begin"/>	\$0.00 (\$200.00)
Dec 09 2015 (Dec 09 2015)	Desmond Fritch Fritch_Desmond (UONB) Lab	PC-DF-354 Click here to request services	Waiting for Researcher to Agree <input type="button" value="Agree"/> <input type="button" value="Disagree"/>	\$260.00 (\$260.00)
Nov 16 2015 (Nov 16 2015)	Carmela Joslyn Fritch_Desmond (UONB) Lab	CIF-CJ-630 Software	Waiting for Core to Agree	\$0.00 (\$0.00)
Nov 03 2015 (Nov 03 2015)	Desmond Fritch Fritch_Desmond (UONB) Lab	Fritch DF 562 2015 Training	Waiting for Core to Agree	\$0.00 (\$0.00)
Nov 03 2015 (Nov 03 2015)	Desmond Fritch Fritch_Desmond (UONB) Lab	Fritch DF 561 2015 Training	Waiting for Core to Agree	\$0.00 (\$0.00)
Apr 07 2014 (Apr 07 2014)	Desmond Fritch Fritch_Desmond (UONB) Lab	PC-DFV-296 Click here to request services Job #1530 - March 2014 charges	Completed Data Analysis - finished	\$4,281.25 (\$4,281.25)
Mar 07 2014 (Mar 07 2014)	Desmond Fritch Fritch_Desmond (UONB) Lab	PC-DFV-284 Click here to request services Job #1527 - Feb 2014 charges	Completed Data Analysis - finished	\$2,055.00 (\$2,055.00)
Feb 10 2014 (Feb 10 2014)	Desmond Fritch Fritch_Desmond (UONB) Lab	PC-DFV-278 Click here to request services Job #1519 - Jan 2014 charges	Completed Consultation - finished	\$1,375.00 (\$1,375.00)

2. Find the appropriate service request on **View All Requests**. Click the **Begin** button.

Dec 02 (Dec 02 2015)		NFS-MA-1440	Waiting for Core to Begin <input type="button" value="Begin"/>	\$0.00 (\$0.00)
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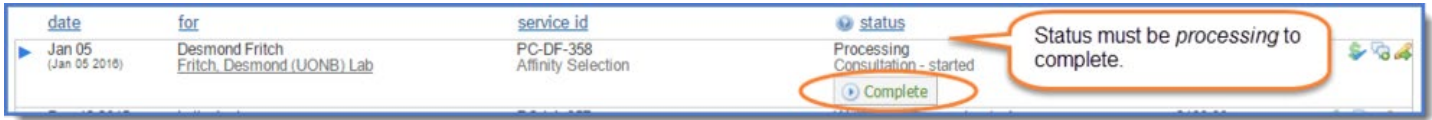
3. The process will update to **processing**.

Dec 02 (Dec 02 2015)		NFS-MA-1440	Processing <input type="button" value="Complete"/>	\$0.00 (\$0.00)
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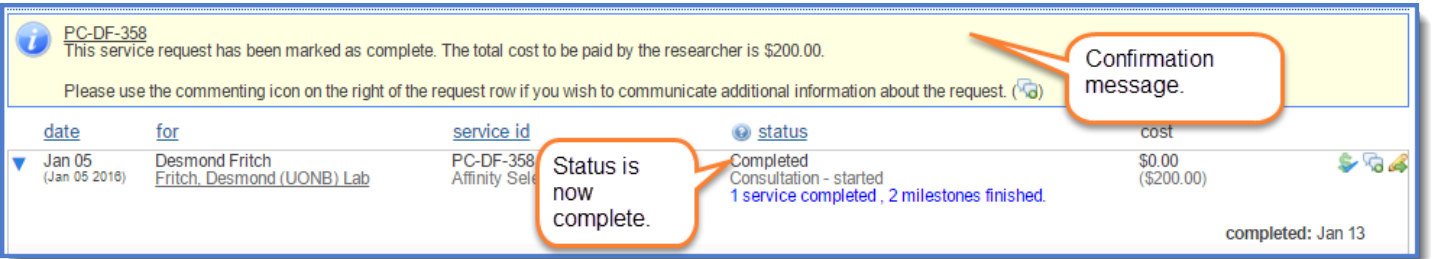
4. Once the status is processing, core staff can add services, comments, milestones, attachments, and other items as they work on the project.
 - a. For details on advanced features of iLab, please visit <http://help.ilabsolutions.com/managing-service-and-project-requests>.

To mark a request as complete:

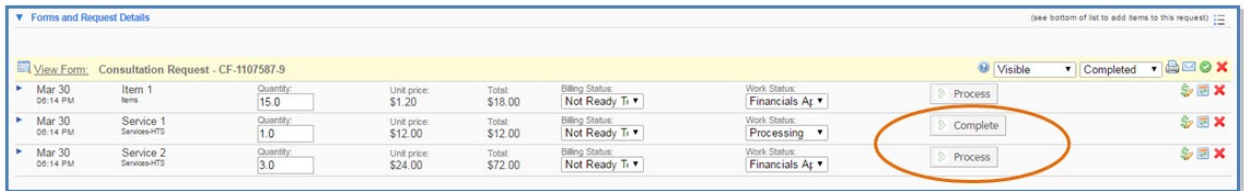
1. Once the work has been finished and the core is ready to bill, locate your service request on the **View all Requests** tab.
2. Click on the green **complete** button.



3. A confirmation message displays, and the status of the request is updated.

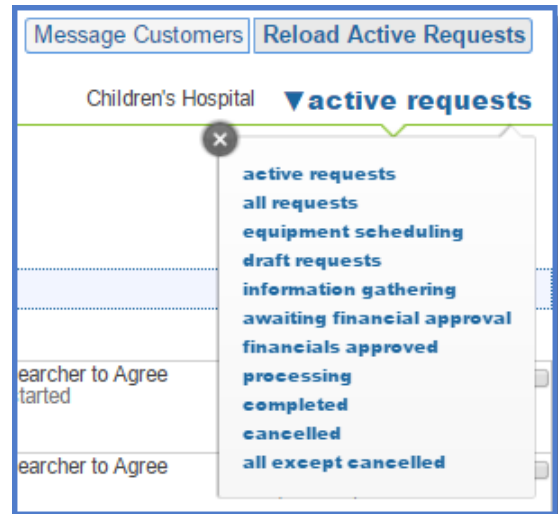


4. When a request is marked **Complete** all service items and milestones that have not been updated will update to **Completed** or **Finished**. Unless otherwise designated on the line item, the completed services will then be available for billing.
 - a. Note, if you wish to leave the service project open, but bill for specific service items. Click **Process** and then **Complete** on the individual service line.



Historical Project Review

- All requests with a **Completed** status will be removed from your active requests list but can be searched for using filter options at the upper right of the request list table.
- Using the “View All Requests” tab is useful in researching billing disputes or reviewing previously completed projects.
- Click **active requests** to display these filter options.



Next Steps

- All charge lines completed via the project workflow process – will display as an option next time the core generates a billing event.
- Consult the iLab Core Manager User Guide for instructions on billing events, viewing invoices, refunds, and other system behavior.

Communicating with Customers

Cores can communicate directly with users within iLab. This feature allows all messages to be saved directly on the service requests and can be viewed at any time by the customer and the core.

1. The core can view and access all active requests on the **View All Requests** tab.
2. Click on the **comment icon** to the right of the request to use the communication tool.
 - a. The email interface window will be displayed.

date	for	service id	status	cost
Jan 13 (Jan 13 2015)	Zhen Loyd Ahmood, Murfie (CHOM) Lab	NFS-ZL-1662	Waiting for Researcher Approval	\$100.00 (\$100.00)
Jan 13 (Jan 13 2015)	Zhen Loyd Ahmood, Murfie (CHOM) Lab	NFS-ZL-1661	Waiting for Researcher Approval	\$100.00 (\$100.00)
Jan 13 (Jan 13 2015)	Zhen Loyd Ahmood, Murfie (CHOM) Lab	NFS-ZL-1660	Waiting for Researcher Approval	\$100.00 (\$100.00)
Jan 13 (Jan 13 2015)	Zhen Loyd Ahmood, Murfie (CHOM) Lab	NFS-ZL-1659	Waiting for Researcher Approval	\$0.00 (\$0.00)
Jan 13 (Jan 13 2015)	Zhen Loyd Ahmood, Murfie (CHOM) Lab	NFS-ZL-1658	Waiting for Researcher Approval	\$100.00 (\$100.00)
Jan 13 (Jan 13 2015)	Zhen Loyd Ahmood, Murfie (CHOM) Lab	NFS-ZL-1657	Waiting for Researcher Approval	\$100.00 (\$100.00)
Jan 13 (Jan 13 2015)	Zhen Loyd Ahmood, Murfie (CHOM) Lab	NFS-ZL-1656	Waiting for Researcher Approval	\$0.00 (\$0.00)
Jan 13 (Jan 13 2015)	Zhen Loyd Ahmood, Murfie (CHOM) Lab	NFS-ZL (CID)	Waiting to Submit to Researcher	\$1,386.00 (\$1,386.00)
Jan 13 (Jan 13 2015)	Zhen Loyd Ahmood, Murfie (CHOM) Lab	NFS-ZL (CID)	Waiting to Submit to Researcher	\$5,000.00 (\$5,000.00)
Jan 13 (Jan 13 2015)	Zhen Loyd Ahmood, Murfie (CHOM) Lab	NFS-ZL (CID)	Waiting to Submit to Researcher	\$10.00 (\$10.00)

Financial managers:

- Myrtle Atwood<esther_labsolutions@e.rainforestqa.com> Phone: 999-9999
- Angel Arizmendi<esther.sourya@labsolutions.com> Phone: 999-9999
- Becky Millet<bmillet_23090@test.ilabx.com> Phone: 999-9999
- Bogan Robin<robin_28373@test.ilabx.com> Phone: 999-9999
- Dewayne Kan<dikan_23174@test.ilabx.com> Phone: 999-9999
- Francis Overton<foverton_117610@test.ilabx.com> Phone: 999-9999
- Laurence Saner<lsaner_118742@test.ilabx.com> Phone: 999-9999

Department managers:

- Rainforest Department<rainforest_deptmgr@test.ilabx.com> Phone:

Principal investigators:

- Myrtle Atwood<esther_labsolutions@e.rainforestqa.com> Phone: 999-9999
- Rainforest Department<rainforest_deptmgr@test.ilabx.com> Phone:

Researcher:

- Zhen Loyd<esther_labsolutions@e.rainforestqa.com> Phone: 999-9999

Core contacts:

- Kera Petrick<esther_labsolutions@e.rainforestqa.com> Phone: 999-9999

Additional Email Addresses

Email content:

Message(optional):

Send me a copy of this email:

Send Message

3. Complete the information and click **send message**.
 - a. After you click on **Send Message**, the selected recipients will receive the email. An audit trail of the email exchange through iLab can be seen under comments on the request.

date	for	service id	status	cost
Dec 12 2015 (Dec 11 2015)	Lelia Andrus Andrus, Lelia (CHOM) Lab	PC-LA-357 Click here to request services	Waiting for Researcher to Agree	\$100.00 (\$0.00)

Disagree

Overview

Payment Information

Forms and Request Details

View Form: Sample Submission Form

Consultation description: click to edit note: click to edit

Sample Received description: click to edit note: click to edit

Digestion description: click to edit note: click to edit

Data Analysis description: click to edit note: click to edit

Comments

Jan 13 '16 11:59 AM Kelli Bank said This is a test comment to illustrate where the comments display.

Attachments & URLs

PC-LA-357 quote_101808012016.pdf Desmond Fritch 2016 Jan 06 @ 10:18